DramaDirectory

Your guide to European TV Drama Commissioning Editors and Buyers

MEDIA

CONTENTS

This directory is an initiative of MEDIA Desk Ireland and MEDIA Antenna Galway.

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INTRODUCTION

The network of MEDIA Desks and Antennae in Europe is delighted to publish this inaugural Guide to European TV Drama Commissioning Editors and Buyers.

We became aware of an information gap in this area in our work with clients, in particular with applicants for the TV Broadcasting support scheme. We thought the best way to address this was to make use of our own network, with each MEDIA Desk providing information on TV Channels in its own territory. It has proved to be a rewarding collaboration – a true European co-production.

We would like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory, the European Audiovisual Observatory for allowing us to use information from the MAVISE database and the Broadcasting Authority of Ireland for sponsoring this publication.

This directory is complementary to all market and database initiatives funded by MEDIA with the aim to achieve a transparent single market for all Audiovisual programmes in Europe. Examples of other MEDIA publications include the Training and Networks guide and the Markets and Networks Guide which can be downloaded from the MEDIA website.

We hope the Drama Directory will prove to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE MEDIA DESKS AND ANTENNAE

FOREWORD

One of the priorities of the MEDIA Programme is to increase the circulation of European audiovisual works inside and outside the European Union. There are particular challenges involved in seeking to boost the circulation of European Drama projects. We therefore very much welcome the initiative of the European network of MEDIA Desks and Antennae in publishing this Drama Directory which will be a useful resource for European producers seeking investors and buyers for their projects.

The MEDIA Programme supports Television Drama at the development stage through the Single project and Slate Funding support schemes. There is also a dedicated action line to support the Television Broadcasting of European Audiovisual works including TV Drama.

As this scheme requires investment from at least three broadcasters in different member states of the European Union, it is clear that this Drama Directory will prove to be a valuable resource for potential applicants.
The collaboration of the MEDIA Desks and Antenna in creating this Directory is an example of the Network in action and showcases European co-operation at its best.

Aviva Silver
Head of MEDIA Unit MEDIA Programme European Commission

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Head of MEDIA Unit Education, Audiovisual and Culture Executive Agency (EACEA)

SUPPORT FOR TELEVISION BROADCASTING

MEDIA offers a funding scheme that supports Television Broadcasting of European Audiovisual Works.

The MEDIA 2007 Programme aims to promote the trans-national dissemination of European audiovisual works produced by independent production companies by encouraging cooperation between broadcasters on the one hand and independent producers and distributors on the other. This scheme is open to Independent European production companies to produce fiction, creative documentaries or animated films.

The following criteria apply.

- The applicant company must have the commitment of at least three broadcasters in different member states of the European Union for the proposed project.
- The minimum eligible duration for individual drama project or drama series is 50 minutes; 25 minutes for Creative Documentary and 24 minutes for animation projects
- Proposals must be submitted at the earliest 6 months before the first day of principal photography and at the latest on the first day of principal photography.
- Applications must have 50% of the production finance for the project in place and the production budget must be minimum 50% financed by European sources.

For Fiction Programming and or Animated projects, the maximum sum awarded is €500,000 per work and this financial contribution may not exceed 12.5% of the production budget. The maximum sum awarded for a Documentary Project is €300,000 and may not exceed 20% of the production budget.
In the current MEDIA Programme, there is one call per year and three deadlines per call.

For more information, please contact your local MEDIA Desk – Contact Details are at the back of this guide.

Das Jüngste Gericht, (The Last Judgement), 2007 – Production Company: Lisa Film

AUSTRIA

The Austrian television landscape is dominated by the public service broadcaster ORF, which has gradually been losing market share since the introduction of private television. Its two channels, ORF1 and ORF2, had a combined average market share of 38.2% in 2009 (down 8.5% since 2006). ORF2 is still the most watched channel, with 23.1% of viewers on average (down 3.1% since 2006). German television channels are also widely viewed in Austria. The main German private channels have Austrian versions, with a combined audience share in 2009 of more than 25% (the most important of these being RTL Österreich, Sat1 Österreich and Prosieben Austria).

German public service channels had a combined audience share of more than 10%. Private television was introduced very late in Austria with the launch of the channel ATV in 2003 (in 2009 its audience share was 3.5%). Two more private channels have recently been launched: Austria 9 TV, (Burda Verlag) in 2007; and Puls 4 (ProSiebenSat.1 Media AG) in 2008. In 2009 Salzburg TV was rebranded as Servus TV and became a national channel. (Audience data source: Eurodata TV Worldwide/ AGTT / GfK Teletest). According to the 2009 Communications Report published by the regulatory authority, KommAustria, the number of households receiving digital television in October 2009 was 60%. Satellite is the most important mode of television reception in Austria, followed by cable.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ORF

ORF is an independent public service broadcasting corporation. It has two national TV channels: ORF 1 and ORF 2 plus four national and nine regional radio channels, all financed by licence fees and advertising. The TV channels are complementary and are both transmitted by terrestrial network as well as satellite in collaboration with 3sat.

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AUSTRIA

BELGIUM

The three Communities (Flemish, French and German-speaking) each have responsibility for audiovisual communication and constitute separate markets, the common feature being the fact that all three markets have been extensively cabled for three decades and are thus able to receive the channels of neighbouring countries. They each have their own systems of regulating the audiovisual media and their own public service broadcasters, namely the VRT, the RTBF and the BRF respectively.

The main players in the Flemish Community are the VRT, which operates the public channels Één, Ketnet and Canvas, and VMMa (Vlaamse Media Maatschappij), which runs the channels VTM, 2BE, Anne, Jim and vtmKzoom. Eén (VRT) continues to dominate the market, with a steadily rising daily audience share, which reached 32.1% in 2009 (compared with 28.7% in 2006). Behind Eén in audience terms are the channel VTM (20.9%) and the second public channel Ketnet/Canvas (children's programmes during the day and cultural programmes in the evening), followed by VT4 and 2BE. The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels. (Audience data source: Eurodata TV Worldwide / CIM / GfK Audimetrie SA)

Almost 100% of Belgian households subscribe to pay-TV, this mainly being due to the extent of the country's cable network. About 80% of Belgian homes still receive cable television but this figure is steadily declining and alternative services, which are now fully competitive, have emerged. IPTV is the main competitor for cable television services in Belgium.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

BTV (BELGIUM TELEVISION SA)

Created in 2011, BTV operates 2 generalist channels totalling a 5.1% market share in the South of Belgium. AB3 is devoted to fiction (67%) and entertainment for an audience aged 15-34 year old. AB4 focus on fiction (59%) like cult movies and classical series towards an older audience (35+).

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BETV

Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

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RTL-TVI – CLUB RTL – PLUG TV

RTL, a subsidiary of CLT-UFA/RTL Group, operates 3 channels in French-speaking Belgium with a 30% market share. RTL-TVi is a generalist channel combining news programmes, entertainment, commercial films and series (mainly American). Until recently, Club RTL was focused on niche programme for kids, series and films but now it plans to go more mainstream. Plug addresses young adults with series, cult movies, reality shows and music programmes.

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RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

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VRT (VLAAMSE RADIO-EN TELEVISIEOMROEP) ÉÉN.

VRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

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SBS BELGIUM, VT4 AND VIJFTV

VT4 is an entertainment channel specifically targetting a young teenage audience, with national coverage but focusing on the Belgian-Flemish community and broadcast by SBS Belgium. It broadcasts 168 hours per week and is a paid access channel. VijfTV is also broadcast by SBS Belgium. It is a lifestyle channel specifically targetted at women in the Belgian-Flemish community and is also a paid access channel on air 168 hours per week.

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VMMA (VLAAMSE MEDIA MAATSCHAPPIJ), VTM AND 2BE

VTM is the main private generalist channel in the Flemish community of Belgium. The channel is also available in the German-speaking regions of Belgium. It is a paid access channel and is active 168 hours per week. 2BE is a national entertainment channel targetting the Belgian-Flemish community but which is also available in Belgian-German-speaking communities.

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CYPRUS

The audiovisual landscape in Cyprus is composed of the channels operated by the public broadcaster CYBC (RIK1, RIK2, RIK HD and RIK Sat), two Cypriot private channels (Sigma and CNC plus), the sister channels of the main Greek commercial stations (ANT1 and Mega) and two sets of pay-TV channels (Alfa TV and LTV)

In 2009, for the second time in three years, ANT1 led the market with 19.3% of average daily audiences (+1.9%), followed by Sigma (19%). The most popular public channel (RIK1) was in third position with a 16.5% market share, an increase for the second year running. Mega achieved a stable 11.9%, followed by RIK2 and ET1, the main Greek public channel. The top six channels account for around 75% of daily audiences (+1.5% compared to 2008). In other words, the market remains relatively concentrated in comparison with other European markets, which is partly a result of the small number of homes that subscribe to multi-channel packages. (audience data source : Eurodata TV Worldwide / AGB Nielsen Media Research Cyprus).

The multi-channel transmission market is dominated by four distributors. Multivision, with its Nova package, is the only satellite television provider operating in Cyprus, while Cablenet is the only provider on the cable TV market.

The operators established in the northern part of the country are not recognised by the Cypriot administrative authorities. The main operators are the Turkish broadcaster Bayrak Radyo Televizyon Kurumu (BRT1 and BRT2)), which is controlled by the Turkish Cypriot administration, and several local stations, most of which are rebroadcast via satellite.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

CYPRUS BROADCASTING, CORPORATION (CYBC)

CyBC is a generalist channel broadcast by the Cyprus Broadcasting Corporation. It has national coverage and is broadcast in Greek. It is a free HD public channel, broadcast over the DTT network.

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ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

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SIGMA TV

Sigma TV is the main private TV channel in Cyprus and main TV channel in Cyprus in terms of audience. SIGMA has a programmes deal with the Greek channel Star Channel. Sigma targets mainly young urban adults. SIGMA prime time schedule is composed of local (40%) US (25%), mainland Greek (15%) and other (20%) programming. It has free national coverage, active 168 hours a week and is broadcast in Modern Greek.

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CZECH REPUBLIC

In the Czech Republic, the television market continues to be dominated by the private channel Nova TV (Central European Media Enterprises), which in 2009 had a market share of 37.9% (down 3% since 2006). The main channel of the public service broadcaster Czech Television, CT1, has a reasonably steady share with 19% (down from 21.5% in 2006). In third place is the private channel Prima TV (Modern Times Group), which had a share in 2009 of 16.5% (down from 20.2% in 2006).(Audience data source: Eurodata TV / ATO / Mediaresearch)

All the main operators have launched additional channels over the past 3-4 years. The Nova TV family channels include Nova Sport and Nova Cinema (and the main channels are also broadcasting in HD). The public service broadcaster has a sport and a news channel (CT 4 Sport and CT 24), and has also launched a HD channel (CT HD). Prima TV launched two entertainment channels in 2009: Prima Cool targeting men, and R1, which targets women. It currently provides a space for the R1 regional channels network established in 2008.

The transition to digital terrestrial television in the Czech Republic has taken off and the process of digitisation has been developing rapidly in the Czech Republic. The market for satellite (DTH) services in the Czech Republic is very competitive with four services available.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ČESKÁ TELEVIZE (CZECH TELEVISION)

Česká televize is Czech public service broadcaster. It is financed mostly from television licence fees, partly from business activities. It broadcasts on four channels: ČT1, ČT2, ČT24 (news channel) and ČT4 (sport channel). While ČT1 is a mainstream channel for the wide public, ČT2 is targeted at minorities. The programming offers news, current affairs, documentaries, art programmes, drama, sports, entertainment and educational programmes as well as programmes for children and youth.

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TV NOVA

CET 21 is a private broadcaster which broadcasts on several channels: Nova (private channel with the biggest market share), Nova Cinema, Nova Sport (sport channel) and MTV Czech Republic. The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

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FTV Prima is a private broadcaster which broadcasts on two channels, Prima TV (second biggest market share) and Prima COOL. Prima TV's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes.

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HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, Cinemax, Cinemax2 and AXN.

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Lærkevej (Park Road), 2009. Production Company: Cosmo Film

Anna Pihl, 2006. Production Company: Cosmo Film

DENMARK

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The Danish market is the only one in Europe in which public channels, operated by the two public broadcasters, DR and TV2, still attract more than half of average daily audiences. The TV2 channel continues to dominate the market (29.3% of daily audiences in 2009), followed by DR1 (21.9%). The two main public channels therefore account for more than 51% of average daily audiences in 2009 (10% less than in 2006) and, together, the 14 public channels (seven operated by DR and seven by TV2) accounted for almost two thirds of daily audiences and three quarters of prime-time audiences in 2009. The most popular private channel is TV3 (Swedish MTG group), with a slightly increased daily market share of 5%. The other main private channels are TV3+ (MTG group, 3.3% daily audience share) and Kanal 5 (ProSiebenSat.1 Media AG), which stabilised at 2.9% in 2009. (Audience Data Source: Eurodata TV Worldwide / Gallup TV meter)

The Danish public authorities decided to privatise TV2 in May 2003, and this aid, amounting to EUR 67 million, was approved by the European Commission in August 2008. In January 2009 the government published a plan aimed at partially transforming TV2 into a pay-TV channel from 2012. Terrestrial analogue signals were switched off, as planned, on 1 November 2009. IPTV appears to be a rapidly growing market in Denmark with 6 companies operating in 2010.

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the tv channel in 1951. DR does not possess any RTB licence but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two channels, DR1 and DR2 - and three new channels from November 2009: DR K (Culture, history, music), DR Ramasjang (Children's programming) and DR HD (Programmes in HD). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning tv series, such as *The Protectors* (2010), *Unit One* (2002), *Nikolaj & Julie* (2003), *The Eagle* and *Young Andersen* (2005). And with additional nominations for series like *Better Times* (2004), *The Killing* (2007 and 2008) and *Mille* (2009), DR has established itself as an important player in the international world of drama production.

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TV2

TV 2 is a publicly owned television station in Denmark based in Odense. The schedule is Public Service driven with emphasis on a full range schedule and a strong backbone of Danish produced programming. TV 2's economy is solely based on advertizing revenues. TV 2's overall share (21-50) is 30% and the commercial share (21-50) is 49%. TV 2 has five subsidiary stations known as TV 2 Zulu, targeted at youth, TV 2 Charlie, oriented towards older audiences, TV 2 News, TV 2 Film, a non-stop movie channel and TV 2 Sport, as well as the internet-based pay-per-view channel TV 2 Sputnik. TV2 has aired a number of successful Danish TV fiction, such as *Anna Pihl* and *Lærkevej* (both MEDIA supported).

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TV3 DENMARK

TV3 is one of the channels owned by the Viasat Corporation. They are broadcasting from the UK. There are a number of sister channels like TV3+, TV3 Puls, TV2 Sport, TV1000 and more. The last few years TV3 has started to include Danish TV-fiction in their schedule and have had success with series like *2900 Happiness* and *Lulu & Leon*.

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SBS TV

SBS TV is part of one of Europe's biggest TV and radio broadcasters, the German ProSiebenSat1 Media. In Denmark SBS TV consists of four TV stations Kanal 4, Kanal 5, 6'eren and The Voice TV plus two radio stations The Voice and Nova FM.

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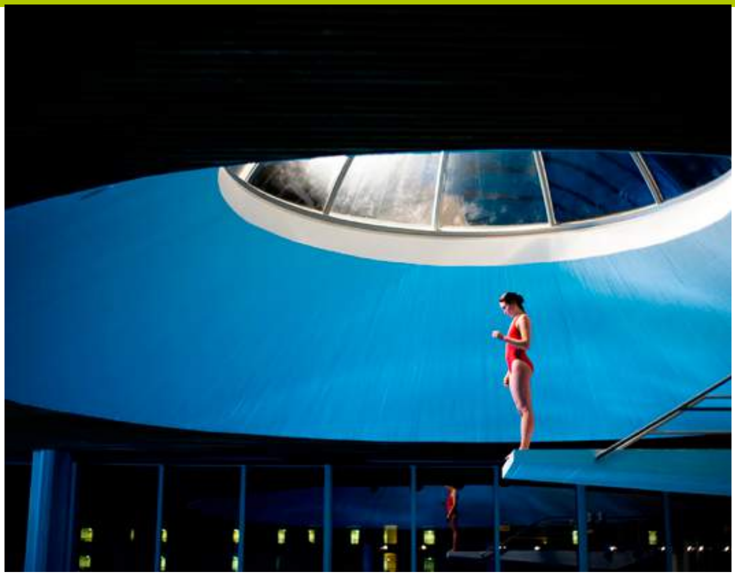
DENMARK



Jälkilämpö, (Latent Heat), 2009 – Production Company: Kinotar Oy

Alamaailma (Underworld Trilogy), 2011 – Production Company: Vertigo Oy

FINLAND

Finland is one of Europe's most advanced countries in terms of digital broadcasting: analogue terrestrial signals were switched off in 2007 and cable television transmissions have also been fully digitised since 2008. Finland is now turning to second generation digital terrestrial television (DVB-T2). However, these changes have not radically altered the balance in the broadcasting market, where the main players remain the public group YLE (YLE TV1, YLE TV2, YLE Teema and Swedish-language channel YLE FST5), the Finnish private media group Sanoma (Nelonen, JIM, LIV) and Swedish group Bonnier (MTV3, Sub and Nordic Canal+ pay-TV channels).

In 2009, the public group YLE did not repeat its positive 2008 results, which had seen the channel YLE TV1 top the viewer ratings and the four main public channels achieve a cumulative audience of 44.5%. In 2009, the public channels' combined daily audience share dropped to 43.8%. In particular, YLE TV1 fell 2.1% to 21.4%, losing its place at the top of the ratings to MTV3, which regained the top place with 22.6%. The audience share of the leading private channel stabilised compared to 2008, after years of sharp decline: MTV3 accounted for more than 30% of the audience before 2005. Following these two channels, the order of popularity remained unchanged: YLE TV2, whose audience share rose to 18.2%, was followed by private channels Nelonen (9.9%), Sub and JIM. (Audience Data Source: EurodataTV Worldwide / Finnpanel)

The Finnish multi-channel distribution market continues to be dominated by cable services. Due to the popularity of cable television in Finland, satellite and IPTV packages are struggling to break through.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

MTV MEDIA

MTV MEDIA has 10 TV channels: MTV3, Sub, AVA and the MTV3 Channel Package, which is a pay-TV package comprising MTV3 MAX, MTV3 Fakta, MTV3 Leffa, MTV3 Juniori, MTV3 Komedia, MTV3 Sarja and MTV3 Scifi. MTV MEDIA represents CANAL+ pay-TV services in Finland. MTV MEDIA (MTV Oy) is owned by Nordic Broadcasting Oy, which is owned by the Swedish publisher Bonnier AB. The MTV3 Channel Package was launched in November 2006. MTV MEDIA has been representing the CANAL+ pay-TV Services since 2009.

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NELONEN MEDIA (CHANNEL FOUR FINLAND) / SANOMA ENTERTAINMENT FINLAND LTD.

Nelonen Media is currently running a total of eight TV channels in Finland, including the 2nd biggest nationwide advertising-funded free-to-air television channel Nelonen (Channel Four Finland). The company also operates two basic cable channels (Nelonen Kino and Nelonen Perhe) with a strong emphasis on international feature film content.

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THE FINNISH BROADCASTING COMPANY (YLE)

Yle is Finland's national public service broadcasting company. Yle operates four national television channels and six radio channels and services complemented by 25 regional radio programmes

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Both images are from *Louis XV le soleil noir*, 2009 – Production Company: Les Films D'Ici.

FRANCE

The main providers of television channels in France are the public service broadcasters France Télévisions and Arte, as well as the private groups TF1 (Bouygues), M6 (RTL), Canal+ (Vivendi), AB Sat (AB group) and Orange (France Télécom), which are often also distributors of television services.
The channel TF1 still has the largest audience share but only had a daily audience share of 26.1% in 2009, which was 5.5 percentage points lower than in 2006. In second and third place respectively were the two public channels France 2 (16.7%) and France 3 (11.8%), both of which are also experiencing a steady decline in their audiences. Behind these, seven channels have audience market shares of between 1 and 3.1%. These include a number of new free-to-air DTT channels, such as TMC (which was bought, together with NT1, in 2010 by the TF1 Group) and W9 (RTL), who hold market shares comparable to those of the incumbent terrestrial channels, such as Canal+, France 5 and Arte. (Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The new free-to-air DTT channels had a combined daily audience share of 15.2% in 2009, compared with 11.1% in 2008, and DTT was received by over half of French homes (56.5%) in June 2010. Free-to-air DTT, which consists of 20 national channels (4 available in HD) and 43 local channels, has proved a success. The regional switchoff of analogue transmissions began in 2010. Ten regions have switched completely to digital terrestrial and the remaining twelve are likely to do so by the end of 2011.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ARTE FRANCE

ARTE is a French-German cultural channel broadcast by a French-German trust consisting of ARTE France and ARTE Deutschland GmbH, each holding a share of 50%. The two country poles deliver proposals for programmes. The central office of ARTE, located in Strasbourg, is responsible for the editorial line of programmes, the programme schedule and the broadcast.

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ARTE GEIE

ARTE GEIE is a public television broadcaster. The ARTE Group is composed of three entities: the headquarters in Strasbourg (ARTE GEIE) and two Members responsible for programme production and delivery, which are ARTE France in Paris (ARTE FRANCE (S.E.P.T.)) and ARTE Deutschland TV GmbH in Baden-Baden (ARTE DEUTSCHLAND TV GMBH).

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CANAL J

Canal J is a Children's (4–14) entertainment channel. Magazines, fiction, cartoons, etc.

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CANAL PLUS

National generalist pay-tv channel whose programming mainly consists of sports programmes, cinema, documentaries and magazines.

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DIRECT 8

Generalist channel broadcast on the digital terrestrial network.

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FRANCE 2

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FRANCE 3

National public service broadcaster with 13 regional units. The regions produce and co-produce both regional and national programmes.

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FRANCE 4

Arts, fiction and entertainment channel. Owned by France Télévisions (89%) and Arte (11%).

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JUNE (EX-FILLES TV)

Entertainment channel targeting female young adults (20 to 30 years old). Programming is composed mainly with TV fictions and magazines. The channel replaced Filles TV in October 2009, which was launched in 2004, targeting 11 to 17 year old girls.

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M6

Second free-to-air commercial generalist channel in France. 48,6% owned by RTL Group.

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13ÈME RUE / SYFY / SYFY HD (NBC UNIVERSAL GLOBAL NETWORKS)

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RTL9 (FRANCE)

RTL9 is broadcast via cable and satellite in France, and has also long been broadcast on the analogue terrestrial network in Lorraine (French region located near the Grand Duchy of Luxembourg) and in the Grand Duchy of Luxembourg (but analogue transmissions were shut down in July 2010). RTL9 is jointly owned by Groupe AB and by CLT-UFA.

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SÉRIE CLUB

Série Club and TF6 (50%-owned), target audiences looking for entertainment and series.

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TF1

TF1 is a national French TV channel, controlled by TF1 Group, whose major share-holder is Bouygues. TF1's average market share of 24% makes it the most popular domestic network. Flagship shows include Star Academy (Endemol's international competitor to the X Factor franchise), CSI and House, M.D. TF1 originally stood for Télévision Française 1 (French Television 1). Since its privatisation in 1987, the abbreviation is no longer expanded, so as to avoid confusion with the Entertainment channel targeting young adults. Jointly owned by the two main French commercial broadcasters (TF1 and M6).

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TF1 INTERNATIONAL

Created in 1995, TF1 International is the worldwide distribution and acquisition arm of the TF1 Group, one of the leading media groups in France.

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FRANCE

TV5 MONDE

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

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Die Wanderhure (The Whore), 2010 – Production Company: TV60 Film

Romy, 2008 – Production Company: Phoebus Film (Photo: Aki Pfeiffer)

GERMANY

Germany has the largest television market in Europe and it is also one of the most competitive. More than 37 million households had a TV set at the end of 2009 in Germany, of which 50.1% received television by cable and 43.7% by satellite. The number of households with access to digital television had reached almost 62% by June 2010, according to the figures published by the ALM (Association of State Media Authorities).

The increasing number of channels has led to a steady decline in the viewer ratings of the traditional major channels in recent years. The two national public service channels (ARD and ZDF) had a combined share of 25.2% in 2009 (down from 27.8% in 2006). Sat.1, ProSieben and VOX have held their shares steady in the last year, while the share of RTL dropped slightly. Cable represents the most common mode of television distribution, and the digitisation of the network reached almost 34% at the end of 2009. The sector has experienced major consolidation in the last few years. There are now just four major operators. Germany completed the switch off of analogue transmission in December 2008 (aside from in a few small rural areas) and at the end of 2008, almost 100% of households were covered by digital terrestrial TV. Pay-TV remains relatively undeveloped in Germany, largely because the range of free channels is very broad and meets the needs of most German viewers

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ARD – DAS ERSTE

ARD Das Erste is the public service broadcaster's first channel.

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3SAT

3sat is a Pan-European channel specializing in cultural programming. The channel is jointly operated by ARD (Germany), ZDF (Germany), ORF (Austria) and SRG (Switzerland).

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NDR – NORDDEUTSCHER RUNDFUNK (NORTHERN GERMAN BROADCASTER)

NDR is a regional public service channel providing generalist programming and information about the Länder Bremen, Hamburg, Mecklenburg-Vorpommern, Niedersachsen, and Schleswig-Holstein. Being the so-called "third ARD channel" in this region, the channel broadcasts its own programmes. As a member of ARD, it also provides programmes to the first ARD channel (Das Erste).

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RTL

RTL Television is Germany's most successful private broadcaster, watched by 20 million people daily, target audience 14-49 years. RTL Television focuses on classical means of transmission as well as on new media and technologies. The channel belongs to the Mediagroup RTL Germany, one of the leading media companies in Germany.

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RTL VOX

RTL Vox is a generalist commercial channel owned by RTL Group.

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PROSIEBEN TELEVISION GMBH & SAT.1 SATELLITEN FERNSEHEN GMBH

Free TV private channel in a network; part of the German channel network ProSiebenSat1 TV Deutschland GmbH (company of the ProSiebenSat1 Media AG).

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KABEL EINS

Kabel eins is a generalist commercial channel owned by ProSiebenSat.1 Media AG. Its target audience is aged between 30-49. It is a private TV channel of the channel network ProSiebenSat1. The programme mainly consists of bought motion feature films and series. Only the entertainment formats with daily news, report-magazines and documentary broadcastings are produced by the channel or by order. The programme explores culture, science as well as entertainment and also aims to appeal to older age groups.

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TELE 5

TELE 5 is a national Free-TV channel that addresses all viewers with a broad fictional programming of feature films, series and docu-fiction. Own productions like 'Gottschalks film column' and 'Gottschalk's Classics' – a cinema magazine –complete the wide range of content. As a subsidiary of the Tele Munich Group (TMG), TELE 5 has access to their programme catalogue with German – speaking TV rights to more than 5000 feature films, TV movies and mini-series. Additional acquisitions from major studios and independent distributors complement the versatile movie and series programme. TELE 5 is receivable nationwide in over 32 million households via cable and satellite, in metropolitan areas also via DVB-T.

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KIKA DER KINDERKANAL VON ARD UND ZDF

KIKA is a Public service children's channel. The channel is jointly operated by ARD and ZDF. Series, feature films, magazine programmes, documentaries, educational programmes, specials and theme days, own productions, live shows, numerous television premieres as well as children's programme classics from ARD and ZDF. Ad free, target group oriented, diverse quality programme for everyone from three to 13 years and above.

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BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television programmes which reach most of Western Europe. As part of the Ard network, BR makes a significant contribution to the five main national ARD TV channels in Germany. Feature films and documentaries are a priority.

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MDR – MITTELDEUTSCHER RUNDFUNK

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the RBB contributes to the output of the national tv-channel 'Das Erste' and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringa. The RBB Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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RBB

The RBB is a public, terrestrial broadcaster based in Berlin and Potsdam. Belonging to the ARD-consortium of public broadcasting stations, the RBB contributes to the output of the national TV-channel 'Das Erste' and also produces regional television programmes. The RBB Drama Department commissions TV-movies as well as series, serials, debuts and feature films.

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WDR – WESTDEUTSCHER RUNDFUNK

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Both of these images are from *The Cliff (Hamarinn)*, 2009. Production Company: Pegasus.

ICELAND

All along since the establishment of Icelandic TV in 1966 the major characteristics of the programming is its high percentage of foreign origin. Iceland is a small language community and local production is far more expensive than the price of foreign material. However, local production has developed, both in numbers and quality. In 20 years, 1995-2008, the three main channels, RUV, Stöd 2 and Skjárinn, almost doubled their production time, from 1.800 hours in 1995 up to 3.500 hours in 2008. The combined local productions remained around 25% af the transmissions.

At present (2011) there are ten national channels. New technology, the arrival of specialized channels and not least condensation in the marketplace make this possible. Icelandic channels with some own programming at the end of year 2009 were as follows. (Years of founding in parenthesis): RUV Sjónvarp (1966), Stöd 2 (1986), Omega (1992), Stöd 2 Sport (1995), N4 (1997), Stöd 2 Bíó (1998), Stöd 2 Extra (1998), Skjár 1 (1998), ÍNN (2007), Nova TV (2008).

The archrivals on the market are RUV and Stöd 2. General channels with varied programmes are RUV, Stöd 2 and Skjár 1. The other seven are more or less specialized channels that mostly try to care for the interests of certain audience groups. All but one are transmitted from Reykjavík, the capital of Iceland. N4 is based in Akureyri, "the capital of the North".

Only four years after the dawn of digital transmissions in Iceland late 2005, six of every ten households in the country had access to a digital receiver. Audiences can tune in to lots of foreign television channels distributed by seven different companies, mostly telecoms, either through cable or antenna. Since 2005 video on demand (VoD) has been offered by some of the telecoms.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RIKISUTVARPID, RUV

Rikisutvarpid, RUV, The Icelandic National Broadcasting Service, is a public service broadcaster owned by the Icelandic state. RUV is financed by state funding and revenues from advertisements. RUV's income can only be allocated for broadcasting purposes. RUV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RUV TV. According to the Broadcasting Act the main obligation of RUV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

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ITC SKJARINN

ITC Skjarinn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Screen One is a pay TV channel financed by subscription fees and advertising revenue. Its main programming needs are scripted dramas and high quality entertainment content. Screen One also produces it's own local programming. Screen One also produces it's own local programming, both scripted and entertainment.

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STÖÐ 2 (CHANNEL 2)

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stöð 2. Stöð 2 is a part of 365 Media, Icelands leading media company. Stöð 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted as well as daily local news and news related programming. As a brand Stöð 2 operates several other subscription channels including two sports channels and a movie channel.

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Both images are from *Jack Taylor*, 2009 – Production Company: Magma Films. Co-produced with RTL (Germany).

IRELAND

In Ireland the national public service broadcaster remains the strongest player in the TV market while British channels and companies continue to play an important role. The two public service channels, RTÉ1 and RTÉ2, had a combined market share of 35.4% in 2009 (4% less than in 2006). The private channel, TV3 (launched in 1998) had an 11.9% market share, for the first time moving into second place above RTÉ2, with 10.2%. The other two national Irish broadcasters are the public service Irish language channel TG4, and the entertainment channel 3e (owned by TV3). The five most watched UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 18.2% in 2009). (Audience data source: Eurodata TV / AGB Nielsen Media Research).

The Broadcasting Act of 2009 consolidated all previous broadcasting legislation. In particular it addressed the governance of public service broadcasting, requiring precise public service remits; explicit entrustment of new activities; independent supervision; transparency of accounts and enhanced controls. The Act also established the new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI, which merged the Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI was officially launched in October 2009 and now also has responsibility for the regulation of public service broadcasters in Ireland. The Act also proposed the creation of two new public service channels: an Irish film channel and a parliamentary channel (Oireachtas).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RTÉ

Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ Two. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ Two is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

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TG4

TG4 (Irish: TG Ceathair or TG a Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

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TV3 is a commercial free-to-air television broadcaster in the Republic of Ireland and Northern Ireland which launched on September 20, 1998. It was the country's first independent commercial broadcaster. TV3 is operated by the TV3 Group which also consists of television channel 3e and the online service tv3.ie

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IRELAND

Dieci Inverni, 2009 – Production Company: Raicinema

ITALY

Italy's two most watched channels are still RAI Uno, the first public channel, and the private channel Canale 5 (Mediaset), which had daily audience market shares of 21.2 and 20.7% respectively in 2009. The gap between them is closing: it was two percentage points in 2006 but was only 0.5 percentage point three years later. Following these in terms of audience ratings are four channels that each have a daily audience share of approx. 10%: Italia 1 (Mediaset), RAI Due, RAI Tre and Rete 4 (Mediaset). All four had a slightly lower daily audience in 2009 compared with the previous year. Apart from the seventh terrestrial analogue channel La 7, with a stable market share of around 3%, no channel has a daily audience share of more than 1% in Italy. The incumbent terrestrial general-interest channels still pull in nearly 80% of viewers. (Audience data source : Eurodata TV Worldwide / Auditel / AGB Nielsen Media Research Italy).

This concentration of audience share is all the more surprising in Italy as the country has a large number of channels: there are more than 400 national and nearly 600 regional and local channels. The leading channel operators are the public service broadcaster RAI and the private groups Mediaset and News Corporation. RAI broadcasts over twenty channels in Italy and five international channels. In May 2010, it absorbed its subsidiary Raisat and the Raisat channels were all renamed. A new channel, RAI 5, was launched in November 2010.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

RAI CINEMA SPA

RAI Cinema, part of the RAI Group, was conceived with the principal objective of giving strength to the Italian Film Industry. One of the principal obligations is to invest in Italian Cinema, thereby contributing to an integral part of Italian culture.

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RAI TRADE SPA

From archives to soundtracks, from major sports events to documentaries, from mini-series to news, from films to entertainment: Rai Trade is the exclusive distributor in Italy and abroad of all rights to Rai's productions. One of its objectives is to contribute to the spread of "Made in Italy" products throughout every sector of the audiovisual industry

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MEDIASET DISTRIBUTION - RTI SPA

Mediaset Distribution is the International Distribution arm of Mediaset Group, the biggest private media company in Italy, the only European major in the industry and one of the most important players in the world's media. Mediaset Distribution commercialises worldwide its ready made programming, scripted formats and international linear channel Mediaset International. With a catalogue of over 500 titles and an average investment of milion euros in new productions, Mediaset Distribution is the leading distribution company of Italian TV Products.

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SKY ITALIA SRL

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

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Both images are from *Annie MG*, 2009 – Production Company: BosBros, with co-producers the broadcasters VRT, VARA & NPS

NETHERLANDS

The most important channel providers on the Dutch market are the public broadcasters, with the national channels Ned 1, Ned 2, Ned 3, and all the digital channels grouped together under the Ned 24 banner, as well as the RTL group, whose channels RTL 4, RTL 5, RTL 7, RTL 8 and RTL Lounge are transmitted under Luxembourg law, and SBS Broadcasting (ProSiebenSat.1 Media AG) with its NET 5, SBS 6 and Veronica channels.

In 2009, the daily audience share of Ned 1 decreased slightly to 20% after several years of strong growth. Following the public channel in audience share terms are the private channels RTL4 and SBS6 with 13.6 and 10.9% respectively. Their market shares have actually risen in the past two years. The two other public channels (Ned 2 and Ned 3) each have a daily share of about 7%, while the figure for the four private channels - NET 5, RTL 7, RTL 5 and Veronica - is between 3 and 5%. Seven other channels have a daily audience of between 1 and 2%. (Audience data source: Eurodata TV Worldwide / Stichting Kijkonderzoek).

The Dutch audience shares seem less concentrated than in other European countries, which can be partly explained by the cable network penetration.
The Dutch public service broadcasting system is made up of some twenty national and 350 local broadcasters.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

AVRO

AVRO is one in the group of the 9 biggest broadcasting associations in the Netherlands, and is financed by license fees and advertising. AVRO Culture & Arts transmits on Nedeland 2. All other Avro programmes are transmitted on Nederland 1, 2 and 3.

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BNN is a Dutch public broadcasting association supported by the Netherlands Public Broadcasting. and targets teenage and young adult audiences. It produces entertainment and informative television programs, radio programs, and feature films.

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EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

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The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

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NTR

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VPRO

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Varg Veum – skriften på veggen (The writing on the wall), 2010 - Production Company: Cinemiso

NORWAY

The audience of the three public channels of the group NRK increased their share in 2009, with a daily audience share of 39.1% versus 37.5% in 2008. Nonetheless, the channel NRK1, with 31.1% was ahead of its private competitors. TV 2 had a 21.3% market share, with TVNorge (ProSiebenSat 1 Media AG) trailing behind with 7.1%and TV3 (Modern Times Group) with 6.1%.

TV3 (MTG), Viasat (MTG) and the Voice TV (ProSiebenSat 1 Media AG) are established in the UK, requiring them to comply with the Television without Frontiers Directive but not with specific provisions under Norwegian legislation, particularly in respect of programming and advertising.

Several new channels emerged in the Norwegian market in 2008 and 2009. For example, the satellite TV Distributor Viasat (MTG) has restructured its sports channels package, closing down Viasat Sport and Viasat Motor on the Norwegian market. The two main private channels TVNorge and TV 2 launched HD versions in October 2008 and June 2009 respectively. Finally, Frikanalen, which was launched in October 2008, started broadcasting on the national digital terrestrial television network in 2009. This is an open, non-commercial channel and is owned by around 60 non-governmental organisations. Pay-TV has a very high penetration rate in the Norwegian market, Just under half of all households subscribe to a cable television service. In a country where 73% of homes have broadband Internet access, the IPTV sector is developing apace and there were six competing services in 2009.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

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TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

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TV3 NORWAY

TV3 is a commercial television channel targeting Norway owned by Viasat. It is broadcasting from the UK and thus avoiding the rules in Norway that apply to advertising.

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TVNORGE

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POLAND

The Polish audiovisual scene at the end of 2009 and the beginning of 2010 was marked by the lack of progress on several important matters (DTT, DVB-H, the public satellite platform, the reform of the public broadcaster, and the transposition of the Directive etc). However, there might be more movement on these issues before the end of 2010.

As far as broadcasting is concerned, the most important players are still the public group TVP and the two private groups TVN (ITI group) and Polsat.
In 2009, TVN propelled itself into second place on the market with a 15.9% daily audience, behind the public channel TVP1 (20.9%). With 15.4%, the second public channel, TVP2, thus now only occupies third place, ahead of Polsat, with an audience of 14.8%.

These four main channels had a combined daily audience of 67% in 2009, compared with 77% in 2006. Following these, there were seven channels that commanded between 1 and 5% of the audience share, compared with just five channels a year earlier. TV Puls (the regional channel formerly owned by the Franciscan Order and had News Corporation in 2007 and 2008 as a shareholder but is now owned by its president, Dariusz Dabski) and Disney Channel Polska crossed the 1% audience share threshold for the first time in 2009.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

POLSAT

Polsat is a television broadcaster-commercial station buying movies for all rights. The channel is also available to watch in Sweden. It is active 168 hours per week and free to watch. Polsat is the third national TV channel broadcast via the terrestrial analogue network, it covers more than 72% of the territory and 85% of the population (2006 data). It belongs to the Polsat group of channels. The schedule of Polsat is generalist.

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TVP

TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

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CANAL PLUS

Established in 1995, Canal+ is a paid TV channel in Poland, Canal+. Programming of Canal+ focuses on feature films (hits, mega hits and premiere movies) and sport (soccer, motorcycle, racing, NBA and others).

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HBO POLAND

HBO Poland is a paid television station which is movie oriented.

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POLAND

TVN

TVN is a private TV station in Poland. Its principle activity is the producing of theatrical movies and TV series.

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SPAIN

In 2009, the public channel TVE La Primera led the market with a 16.4% daily audience share. It therefore overtook Telecinco, a private channel owned by the Italian Mediaset group, whose 15.1% share represents a 3% drop compared to 2008. Antena 3, controlled by the Planeta de Agostini and Bertelsmann groups, remained in third position, with a reduced audience share of 14.7%. Next, the two most recent additions to the Spanish analogue terrestrial landscape continued to establish themselves: Cuatro with 8.2% and La Sexta with 5.5%. TVE La 2 followed with a 3.8% daily audience share. (Audience data sources: Eurodata TV Worldwide / Kantar Media)

The switchover to digital terrestrial broadcasting was completed in April 2010, when analogue terrestrial transmissions were switched off. A large number of channels were launched in 2010 especially for the free DTT network (13TV, Boing, La 10, La Sexta 2 and 3, Marca TV and Nitro).

The extent to which Spanish households subscribe to multi-channel platforms is traditionally low. The market is dominated by the satellite package Digital+, which is owned by Sogecable (Prisa, Mediaset and Telefonica) and was received by less than 12% of homes at the end of 2009.

Although there are still a large number of cable operators, they reach less than 10% of homes. Finally, the current market for ADSL television services (IPTV) is dominated by the Imagenio platform (Telefónica de España), which had more than 700 000 subscribers at the end of 2009, thus establishing itself as Spain's third most important pay-TV player.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Augostini and RTL Group.

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ARAGON TELEVISION

Aragon Television is the autonomous regional channel in Aragon.

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CANAL 9 – TVV – TELEVISIÓN VALENCIANA

Canal 9-TVV is one of the six Spanish regional stations and was created in March 88 although it went on the air only in October 1989 broadcasting for the Valencian Community area covering a population of more than 5 million people in the provinces of Valencia, Castellon and Alicante as well as in the Balearic Islands. Canal 9-TVV broadcasts 6.600 hours yearly in Valencia and Castillian through two channel including in its schedule news, sports, current affairs, game shows, movies, series, sitcoms, animation, documentaries, music and entertainment. In-house production covers a 60% of the total broadcasting time and acquisitions are mainly made in the US, England, Japan, Australia.

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CANAL EXTREMADURA TELEVISION

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

Sociedad Pública de Televisión Extremeña S.A.U.
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CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

Edificio Canal Sur. Avda.
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CASTILLA LA MANCHA

CMT is the first public autonomous channel in Castilla-La Mancha.

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SPAIN

ETB1 – EUSKAL TELEBISTA

EITB is the first communication group of Euskadi It has more than 25 years of experience in the communication world. During this time it has consolidated as a modern and efficient media that daily goes over to more than one million citizens, to whom it mainly offers information and entertainment.

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SPAIN

LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controled by the GAMP (which includes Mediapro) and the mexican group Televisa.

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TELECINCO – GESTEVISION

Telecinco is a Spanish commercial television channel operated by Gestevisión Telecinco. Launched in 1990 as Tele 5, it was the fifth of the national terrestrial television channels. In 1997, Tele 5 was rebranded as Telecinco, dropping the flower logo seen in other Mediaset channel logos. Telecinco is a general channel catering for all audiences. It shows popular films, series and sport.

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TVE – TELEVISIÓN ESPAÑOLA

Televisión Española –TVE – is the national state-owned public service television broadcaster in Spain.

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Both images are from *Drottningoffret (The Sacrifice)*, 2010 – Production Company: Bob Film. (Photographer: Johan Paulin)

SWEDEN

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

The main players in the Swedish broadcasting market are public broadcaster SVT, private Swedish groups Bonnier (TV4 and Nordic Canal+ channels) and Modern Times Group – MTG (TV3, TV6, TV8, TV1000 and Viasat channels, some of which are broadcast from the United Kingdom), and the German group ProSiebenSat1. Media AG, whose channels Kanal 5 and Kanal 9 are also transmitted from the United Kingdom.

In 2009, the public channel SVT1 regained its position as the most watched channel in Sweden, with an increased daily audience share of 20.9%, ahead of TV4 (Bonnier), which fell below the 20% mark. SVT2, Sweden's second public channel, dropped to 7.5% (a market share that has virtually been halved in the space of three years) and lost third place to TV3 (MTG) with 8.4%. It is followed by Kanal 5 (ProSiebenSat1. Media AG) and TV6 (MTG), two established channels, and TV3, broadcast from the United Kingdom.

The combined audience share of these six main channels was only 68.8% in 2009, compared to almost 80% three years earlier. Due to this audience fragmentation, the broadcasting groups have increased their range of specialist channels. In terms of total audience share per group, the six SVT channels saw their market share fall from 39.3% in 2006 to 35.9% in 2009, in contrast to the nine TV4 channels, whose share rose from 26% to 28.3% in 2009.

As far as channel distribution is concerned, the main players in the market remain the Swedish groups MTG, TeliaSonera and Teracom, as well as cable operator Com Hem and the Norwegian Telenor group.

SVERIGES TELEVISION (SVT)

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 68 hours of broadcasting per day on all their channels. 21.1 % of the programming is fiction.

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KANAL 5 / KANAL 9

Kanal 5 and Kanal 9 are part of ProSiebenSat1 media group and are transmitting from London. Kanal 5 has an entertainment and feature film profile. Kanal 9 is a series, feature film and documentaries as well as sports and events channel.

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TV4 / CANAL+

TV4 Group started its transmissions in 1990. TV4 Group has a range of channels under the TV4 brand. Canal+ was started by French Canal+ in 1997 but is now owned by TV4. Canal+ is a pay TV service with 15 channels.

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TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

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VIASAT / TV1000

Viasat has a range of pay tv documentary and sports channels as well as the eight TV1000 film channels. Acquisitions for the Nordic market are handled at the London office.

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NONSTOP TV

NonStop Television is a fast growing TV company that features niche TV channels targeting markets in Scandinavia, The Baltics, Benelux and Africa. Notable channels are Silver broadcasts art house feature films and Showtime that broadcasts action features and series.

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The Promise, 2011 – Production Company: Daybreak Pictures

UNITED KINGDOM

In 2009, the public service channel BBC1 was still the service most watched by all UK households (20.9% audience share, just 2% down from 2006), followed by ITV1 (17.8%). The UK television market is also one of the largest in Europe with a large number of national thematic channels and also many channels that are targeting other countries. Thematic channels are impacting on the generalist channels and the audience shares of BBC2, Channel 4 and Five are also gradually declining. Partly in order to compensate for the drop in the audiences of their main channels, all the national broadcasters BBC, ITV, Channel 4 and five have developed their portfolios of digital channels. (Audience data source: Eurodata TV Worldwide / BARB / TNS UK)

Analogue switch-off is well under way in the UK and should be completed by 2012. The United Kingdom has one of the highest digital penetration rates in Europe. Ofcom's Communications Market Report 2010 shows that at the end of March 2010, 92% of all households received digital TV i.e. 23.6 million homes. Digital terrestrial television (40% of homes) and satellite (41% of homes) are the most important platforms. At the same time almost 99% of cable homes (13%) are digital.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.

BBC

The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website.BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a government grant, not from the licence fee. The BBC also has a commercial arm, BBC Worldwide. Its profits are returned to the BBC for investment in new programming and services.

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BBC WALES

BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

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UNITED KINGDOM

BBC ENGLAND

BBC English Regions is the division of the BBC responsible for local television, radio, web and teletext services in England. It is one of the BBC's four 'Nations' - the others being BBC Scotland, BBC Wales and BBC Northern Ireland. The division is made up of 12 separate regions. The headquarters of BBC English Regions is at The Mailbox in Birmingham, with regional television centres in Manchester, Leeds, Hull, Newcastle upon Tyne, Nottingham, Norwich, Bristol, London, Tunbridge Wells, Southampton and Plymouth, and local radio stations based at 43 locations across England.

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BBC NORTHERN IRELAND

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

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BBC SCOTLAND

BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

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CHANNEL 4

Channel 4 is a public service for information, education and entertainment. The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

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CHANNEL 5

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ITV

ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

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UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Virgin Media and BBC Worldwide, the commercial arm of the BBC. Attracting 36 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Blighty, Yesterday, Home, Really and Good Food. UKTV currently operates 24 broadcast streams when multiplexes (+1s) and HD channels are taken into account, and complementary websites for every channel brand. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions (around 700 hours a year) and acquisitions. All ten UKTV channels are available on Sky Digital and Virgin Media, with Dave and Yesterday also on Freeview.

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VIRGIN MEDIA TV

Virgin Media (officially Virgin Media Inc.) is a company which provides television, telephone and broadband internet services to domestic and business customers in the United Kingdom, delivered primarily through its fibre-optic cable network. The company was formerly known as ntl:Telewest following the merger of NTL Incorporated with Telewest Global, Inc. A further merger with Virgin Mobile UK in 2006 created the first "quadruple-play" media company in the United Kingdom, bringing together television, Internet, mobile phone and fixed-line telephone services.

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S4C

S4C has a staturory obligation to broadcast to a majority of Welsh language output during peak viewing hours (1800 – 2200). The schedule provides a wide variety of popular TV – drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

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STV

STV's broadcasting business incorporates two licences – one for the north of Scotland and one for central Scotland. Together, these services produce dedicated regional programming to over three and a half million viewers across Scotland each week. STV's wide range of programming reflects Scotland's distinctive political, legal, educational, cultural and sporting institutions via news, current affairs and non-news programming, including original drama and factual documentaries. News is at the heart of both services, with STV News bringing viewers live, comprehensive and up-to-the-minute news from across the region with regular evening news programmes and bulletins throughout the day.

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